Military Market

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Auto Aftermarket

Old Cars Fuel New Sales

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Canned Fruits and Vegetables - Page 16

ALA Convention - Page 33

Fulda PX - Page 36

Fresh Meat - Page 40

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Military Market serving the military retail system

NOVEMBER 1983/VOLUME 34/NO. 11
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coming

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January: Buyers Guide, commanders' outlooks for '84
February: Frozen Foods Part 1, Audio, VCS
March: H&BA, Housewares, Navy Exchanges

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Military Market survey

Auto Accessories Enjoy Steady Growth:

Shop Managers Ring Up Strong Sales

AUTOMOTIVE ACCESSORIES' sales are steadily growing, and exchange automotive shop managers are finding they must accommodate more patron requests for these items. A majority of 20 auto shop managers also said in this month's telephone survey that they are making special efforts to attract do-it-yourself mechanics into their stores by using special displays and carefully thought-out merchandising techniques.

While tune up parts lead the list of top-selling items, oil and oil change accessories, and such car care products as waxes, body repair kits and protectants are also helping to fuel the surge in this category. Tire sales are reported to be on the rise, and gasoline sales in the military are closely following the rising consumption pattern of their civilian counterparts.

Gasoline sales may be increasing, but exchange automotive shop managers are evenly divided about whether the prices offered to the military patron are always the cheapest. One manager tells MILITARY MARKET, "The exchange prices are usually about the same as those at any economy gas store in town; the only place the patron realizes any real savings is in the small wayside towns where gasoline is usually more expensive than in the urban areas."

However, virtually all managers surveyed agreed the military patron was saving money in automotive repairs. Seventeen of the 20 exchange automotive shop managers surveyed say they felt that the exchange automotive shop is saving military customers 20 percent or more for all major repairs, and 10 percent or more on all auto parts. "Considering that the going rate for labor charges in this area is $35 an hour outside the gates, I'd say the soldier was getting a pretty good deal on repairs when we charge $15 an hour for labor here on base," says one exchange auto shop manager.

Several managers feel that civilian auto shops often have more modern facilities and better equipment than the military offers its patrons. Several managers lamented the lack of electronic tune-up equipment and diagnostic machines in their stations. "With an alignment machine and a diagnostic analyzer for tune-ups, I could do between 10-16 cars per day, compared to the four to six cars I can service now," one manager tells MILITARY MARKET.

The supply line for replacement parts appears to be a smooth and timely operation for most exchange auto shops. A vast majority of shops say they can find all of the replacement parts they need for most of their repairs within one or two days, and several are able to procure parts the same day. Each auto shop surveyed has worked out arrangements specific to its location to get the parts it needs in a timely manner. "We work daily with four or five major parts houses to get the parts we need in this area because it's just impossible to stock every conceivable part for all the cars on the road today."

One auto shop man, at a location almost 150 miles in any direction from the nearest major city, says, "People at this post are heavy do-it-yourselfers because they have to be. When we get repairs, it's usually of the major kind. Sometimes we, as well as the owners, just have to be patient to get the parts needed."

MM

1 — WHAT IS THE SALES GROWTH FOR AUTO ACCESSORIES AND CAR CARE PRODUCTS IN YOUR STORE? Growing quickly — 4. Average growth — 13. Stagnating — 2. Declining — 1.
2 — WHAT ARE THE FASTEST GROWING CATEGORIES WITHIN YOUR AUTOMOTIVE STORE. Tune up parts — 6. Waxes and car care products — 6. Oil and oil accessories — 4. Body putty and filler — 4.
3 — ARE TIRE SALES INCREASING, DECREASING OR ABOUT THE SAME AS LAST YEAR? Increasing — 12. Decreasing — 1. About the same — 7.
4 — ARE GAS SALES INCREASING OR DECREASING AT YOUR STORE? Increasing — 12. Decreasing — 3. About the same — 5.
5 — DO YOUR PATRONS COMPLAIN ABOUT THE PRICES THEY PAY AT EXCHANGE FACILITIES FOR GASOLINE? Yes — 7. No — 13. **DO YOU THINK THE PATRON IS SAVING ANY MONEY BY PURCHASING GASOLINE FROM THE EXCHANGE?** Yes — 9. No — 5. About the same prices — 6.
6 — WHAT PRICE ADVANTAGE DOES YOUR STORE OFFER OVER CIVILIAN STORES FOR AUTOMOTIVE PARTS AND ACCESSORIES? 0%-5% — 0. 5%-10% — 0. 10%-15% — 4. 15%-20% — 7. 20% or more — 9. **FOR AUTOMOTIVE REPAIRS?** 0-5% — 0. 5-10% — 0. 10-15% — 3. 15-20% — 0. 20% or more — 17.
7 — ARE YOUR PRESENT FACILITIES ADEQUATE TO HANDLE CUSTOMER DEMAND? Yes — 10. No — 10. **WHAT FACILITIES CHANGES WOULD YOU RECOMMEND?** More modern equipment — 9. Better vendor support — 4. New pumps and facilties — 7. More manpower — 5.*
8 — ARE YOU SATISFIED WITH THE SUPPLY LINE FOR REPLACEMENT PARTS FOR AUTOMOTIVE REPAIRS? Yes — 16. No, could be better — 4. **HOW LONG DOES IT USUALLY TAKE FOR AUTOMOTIVE REPLACEMENT PARTS TO GET TO YOUR STORE?** Same day — 10. 1-2 days — 8. 2-3 days — 2.
9 — WHAT ARE YOU DOING SPECIAL IN YOUR STORE TO ATTRACT THE DO-IT-YOURSELF MECHANIC? Special displays — 6. DIY manuals — 4. Seminars/lectures at the hobby shop — 4. Seasonal displays — 7.*
10 — ARE THE SALES AND MERCHANDISING MATERIALS YOU GET FROM HEADQUARTERS HELPFUL? Very helpful — 8. Somewhat helpful — 8. Not very helpful — 1. "What materials?" — 3.
* Adds to more than 20 because of multiple responses.

Military Market Index

		JULY			YEAR-TO-DATE		
Commissaries		**CY'83**	**CY'82**	**%CHANGE**	**CY'83**	**CY'82**	**%CHANGE**
Air Force	CONUS	$145,382	$147,823	-1.65	$1,019,500	$962,390	+5.93
	OVERSEAS	29,860	30,726	-2.82	204,026	192,693	+5.88
	TOTAL	**175,242**	**178,549**	**-1.85**	**1,223,526**	**1,155,083**	**+5.93**
Army	CONUS	108,570	106,184	+2.25	727,742	698,464	+4.19
	OVERSEAS	33,285	31,304	+6.33	233,059	210,184	+10.88
	TOTAL	**141,855**	**137,488**	**+3.18**	**960,801**	**908,648**	**+5.74**
Navy	CONUS	50,292	54,412	-7.57	380,471	358,109	+6.24
	OVERSEAS	5,906	6,419	-7.99	43,608	42,057	+3.69
	TOTAL	**56,198**	**60,831**	**-7.62**	**424,079**	**400,166**	**+5.98**
Marines	CONUS	11,775	11,654	+1.04	79,588	76,613	+3.88
	OVERSEAS	210	188	+11.70	1,341	1,241	+8.06
	TOTAL	**11,985**	**11,842**	**+1.21**	**80,929**	**77,854**	**+3.95**
Coast Guard	CONUS	321	339	-5.31	1,943	2,007	-3.19
	OVERSEAS	142	143	-0.70	1,169	1,243	-5.95
	TOTAL	**463**	**482**	**-3.94**	**3,112**	**3,250**	**-4.25**
All Commissaries	CONUS	316,340	320,412	-1.27	2,209,244	2,097,583	+5.32
	OVERSEAS	69,403	68,780	+0.91	483,203	447,418	+8.00
	TOTAL	**$385,743**	**$389,192**	**-0.89**	**$2,692,447**	**$2,545,001**	**+5.79**
Grocery Stores	U.S.[1]	**$21.909 bil.**	**$21.228 bil.**	**+3.21**	**$141.242 bil.**	**$135.647 bil.**	**+4.12**
Exchanges							
AAFES	CONUS	$232,120	$225,197	+3.07	$1,561,190	$1,498,905	+4.16
	OVERSEAS	149,644	146,051	+2.46	1,063,700	1,020,054	+4.28
	TOTAL	**381,764**	**371,248**	**+2.83**	**2,624,890**	**2,518,959**	**+4.21**
Navy	CONUS[2]	81,967	79,079	+3.65	575,851	569,720	+1.08
	OVERSEAS[2]	34,681	32,686	+6.10	247,183	234,904	+5.23
	TOTAL[2]	**116,648**	**111,765**	**+4.37**	**823,034**	**804,624**	**+2.29**
Marines	CONUS	27,977	28,268	-1.03	190,354	190,332	+0.01
	OVERSEAS	4,626	4,587	+0.85	33,318	32,166	+3.58
	TOTAL	**32,603**	**32,855**	**-0.77**	**223,672**	**222,498**	**+0.53**
Coast Guard	CONUS[3]	6,073	5,840	+3.99	41,298	40,999	+0.73
	OVERSEAS[3]	828	651	+27.19	5,631	4,571	+23.19
	TOTAL[3]	**6,901**	**6,491**	**+6.32**	**46,929**	**45,570**	**+2.98**
Mail Order	CONUS[4]	971	891	+8.98	8,164	7,181	+13.69
	OVERSEAS[4]	3,353	3,797	-11.69	26,650	27,086	-1.61
	TOTAL[4]	**4,324**	**4,688**	**-7.76**	**34,814**	**34,267**	**+1.60**
All Exchanges	CONUS	349,108	339,275	+2.90	2,376,857	2,307,137	+3.02
	OVERSEAS	193,132	187,772	+2.85	1,376,482	1,318,781	+4.38
	TOTAL	**$542,240**	**$527,047**	**+2.88**	**$3,753,339**	**$3,625,918**	**+3.51**
Department Stores	U.S.[1]	**$8.623 bil.**	**$8.206 bil.**	**+5.08**	**$56.745 bil.**	**$53.368 bil.**	**+6.33**

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ships stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard.

Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges, and exchange sales include concession volume.

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SEWING IT ALL UP

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Military Market serving the military retail system

DECEMBER 1983/VOLUME 34/NO. 12
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COVER PHOTO OF DPSC'S UNIFORM MANUFACTURING PLANT BY JOE MATERA
COVER DESIGN BY MATT AROZIAN

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Military Market survey

Vendor Access
They're Neither 'Criminals' nor 'Babies'

VENDOR ACCESS to exchanges continues to be an issue of prime concern to exchange managers, milrep companies and civilian vendors alike.

The consensus among 20 exchange managers (10 AAFES, six NAVRESSO and four MCEX) surveyed this month was that access by vendors plays a vital and key role in determining the merchandisng and sales formulas that help move products from their stores.

Vendor concern over this issue has been heightened in recent months; many salespeople view as restrictive and unnecessarily harsh the vendor visitation policy enforced by AAFES. The American Logistics Association is taking the position that a more open access policy for the sales representative is a necessity if AAFES is to obtain maximum benefit for its customers.

The ALA recently approached AAFES officials with a proposal to allow a three-month test within the Capitol Exchange Region to gather data and write reports about vendor servicing of the exchanges during the test period. That request for a test was denied by AAFES.

Exchange managers who were surveyed this month underscore the need for cooperation with vendors. "It's a two-way street," says one AAFES manager. "Cultivating a good relationship with the vendor pays off in more ways than one — in addition to strong sales, you might just end up with more educated store employees and more attractive displays."

The prevailing attitude expressed is that vendors are both welcome and appreciated inside the stores. "The vendors are our partners in this business. We have to work *with* them, not *against* them as much as we can," says one Navy exchange manager.

Of the exchange managers surveyed, only four — all from AAFES — feel that vendor visitation policies for exchanges are too restrictive. This did not mean the vendors are given free rein in the stores, however. "We have them scheduled on specific dates and times to come in and service their lines, take inventory, and check the stocking. Authorized vendors sign in at the desk, wear badges and are accompanied throughout the store," explains one Navy exchange manager.

Managers generally feel that vendors are doing good jobs in servicing their product lines, and have very few complaints about their actions in the stores. "These people are not criminals and they are certainly not babies, so why should I treat them that way? I have always had a good relationship with the vendors, and although I've read about a lot of problems, I've never personally experienced any in my store," says one AAFES exchange manager.

A majority of the managers feel that companies holding open purchase orders have enjoyed greater access to the stores and therefore better sales than companies whose products are distributed through a warehouse system. One Navy exchange manager remarks, "The shipments come in faster and the bottom line discount is better on an open purchase arrangement."

Managers' opinions are evenly split on the question of whether vendor visitation policies preclude their stores from having the same services available to the civilian market. Seven of the 10 AAFES managers surveyed feel that the agency's policy is adequate and does not need to be re-evaluated. "We've worked within the confines of that policy, and haven't had any complaints yet. I'll support any policy that reduces inventory shrink," says one manager.

Managers from all the resale systems confirm the need to monitor and oversee the activities of vendors in the stores. One AAFES manager perhaps summed up the whole question by saying, "I think the vendor visitation policy at AAFES is consistent with what it should be. You have to have some degree of control over the people who enter your store — vendors, milreps, and customers alike. But you don't want any group to feel like they're being singled out, either."

MM

1 — WHAT CATEGORIES OF MERCHANDISE ARE PRESENTLY SERVICED IN YOUR STORE BY VENDORS? Automotive — 7. Cleaning supplies — 1. Cosmetics and fragrances — 20. Food, beverages & candy — 12. H&BA — 11. Hardware — 6. Home entertainment — 16. Housewares — 7. Linens and domestics — 2. Photography — 11. Traffic Appliances - 5. (Other): Greeting cards — 2. Magazines and books — 3.

2 — FOR WHAT CATEGORIES WOULD YOU LIKE TO BE ABLE TO GET THESE PEOPLE INTO YOUR STORES? No categories — 13. Greeting cards — 1. Magazines and books — 1. Clothing — 1. Computers & stereos — 3. Peg board merchandise — 1. Hosiery — 1. Leather goods — 1.

3 — DO VENDORS EVER PERFORM ANY OF THE FOLLOWING ACTIVITIES IN YOUR STORE? Inventory product — 19. Check or correct retail pricing — 6. Check or correct out-of-stocks — 18. Write orders — 17. Adjust inventory — 16. Move product from warehouse to display — 5. Write up defectives for return to factory — 16. Train store personnel — 15. Put on demonstrations — 17. Conduct truckload sales — 11. Print flyers — 8. Set up P-O-P displays — 16.

4 — DO YOU THINK CURRENT POLICY ON VENDORS ENTERING THE STORE IS TOO RESTRICTIVE? Yes — 4. No — 16.

5 — IF MORE VENDORS CALLED ON YOUR STORE, WOULD YOU HAVE THE TIME TO SEE THEM? Yes — 6. No — 14.

6 — WHAT ADVANTAGES WOULD COME FROM HAVING GREATER STORE ACCESS BY VENDORS? See story.

7 — WHAT DISADVANTAGES WOULD COME FROM HAVING GREATER STORE ACCESS BY VENDORS? See story.

8 — THE AMERICAN LOGISTICS ASSOCIATION HAS SAID THAT COMPANIES HOLDING OPEN PURCHASE ORDERS HAVE ENJOYED GREATER ACCESS AND THEREFORE BETTER SALES THAN COMPANIES WHOSE PRODUCTS WERE DISTRIBUTED THROUGH A WAREHOUSE SYSTEM. Agree — 12. Disagree — 3. Probably — 3. Don't know — 2.

9 — THE AMERICAN LOGISTICS ASSOCIATION HAS SAID THAT PROGRAMS, SERVICES AND SUPPORT GENERALLY AVAILABLE TO THE CIVILIAN MARKETPLACE ARE NOT AVAILABLE TO EXCHANGES AS A RESULT OF THIS POLICY. Agree — 7. Disagree — 8. Don't know — 5.

10 — DO YOU THINK CURRENT POLICY ON VENDOR ACCESS NEEDS TO BE RE-EVALUATED? Yes — 4. No — 16.

Cat Ownership Up; Dog Ownership Down

Going to the Cats

Design by Jack Auldridge/Execution by Garnett Sullivan

As the pet population increases, so does the demand for pet food and accessories.

By DAVID B. COOLEY
Associate Editor

PET OWNERSHIP is continuing to become more common and pet owners are spending more on their animal friends than ever before, say authoritative reports. For the first time in decades, dog ownership has decreased slightly, but cat ownership is showing continued growth.

The U.S pet population last year was led by 48.1 million dogs and 43.9 million cats; the number of dogs was down by 0.4 percent, while cat numbers were up 7.6 percent over 1981, according to the Pet Food Council.

As has been the case in recent years, the growth in cat ownership is far greater than for dogs or any other animal category. While dogs still dominate the field, increasingly large numbers of people are choosing cats as pets. The reasons seem clear, say the experts — the faster growth in cat ownership is a result of the restrictions placed on pet owners in many housing units. Cats are generally smaller, considered to be cleaner and easier to keep as pets and are frequently allowed in places that prohibit dogs.

With substantial increases in the pet population, there have been corresponding increases in demand for all kinds of pet foods and supplies. New brands and formulations of established brands continue to proliferate.

Worldwide sales for pet foods in commissaries during 1982 were $124.1 million, or 2.8 percent of total commissary sales. Sales originating in overseas stores accounted for just over 20 percent of this total.

Last year, national retail sales of dog food stood at $2.9 billion and cat food at $1.6 billion, says the Pet Food Institute. These figures represent a 4.5 percent increase in dog food dollar volume, and an 11.5 percent increase in cat food over the 1981 figures.

In the accessories arena, flea collars, medicinal products, dog and cat accessories, rawhide bones, aquariums and aquatic supplies, small-mammal supplies and bird supplies make up the categories normally found in a pet department or pet store. A SAMI report pegs 1982 growth for these and other pet accessories at 2.7 percent nationwide in units sold over the 1981 figure, while the dollar increase was 6.9 percent.

Foods for Pets

The principal ingredients of pet foods are meat, poultry and seafood by-products, feed grains and soybean meal. The Pet Food Institute emphasizes that pet food manufacturing plants are subject to FDA inspection, and that FDA standards and regulations apply to pet foods just as they do to foods processed for human use. Moreover, most of the 50 states require that pet food labels be registered and approved. The labels must:

- conspicuously identify the product as a dog or cat food,
- display a brand name that is not misleading as to content or nutrition,
- give a guaranteed chemical analysis
- show an ingredient listing in descending order of weight contents.

Ralston-Purina Co. manufactures and markets more pet food than any other company. Because of its long-standing leadership in the industry, Steve Gunning, head of marketing-military sales, says, "Customer demand usually dictates that a large comstore carry all Ralston-Purina brands of pet food."

Quaker Oats Co. has been providing pet-owners with Ken-L Ration dog food and Puss 'n Boots cat food for decades. The blue label dog food has been a standard in the Quaker Oats line since 1942, and Puss 'n Boots has been on the shelves since 1950. Both are readily available in commissaries, says Bob Henderson, coordinator of military sales at

(Continued on page 39)